ClassifyIt 4.6 – User Manual

ClassifyIt is an Add-In for Outlook and Word, of the Microsoft Office 2010 Suite and later products. Testing has been conducted on Office 2010 Suite.

ClassifyIt is SHAREWARE software and must be licensed when used after the test-period.

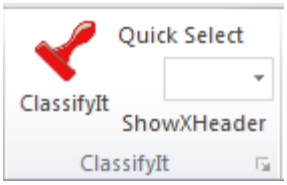
Content

Menu....2
Release Form....2
  Main Interface....2
  Menu Font....3
  Menu Quick-Select....3
    An example of defining a Quick-Select Item....3
  Closing Release Form....4
Quick-Select....4
Show-XHeader....4
Properties....5
  Template....5
  Keyword & Category....6

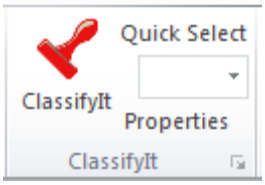
Menu

The ClassifyIt menu integrates into the Outlook and Word applications.

The Outlook menu appears whenever an email is opened (e.g. when creating a new email or when replying to an email). The menu offers 3 user functions to add and control security classification information for emails. The full ClassifyIt release form, predefined Quick-Select classifications and a view on added email XHeader information.



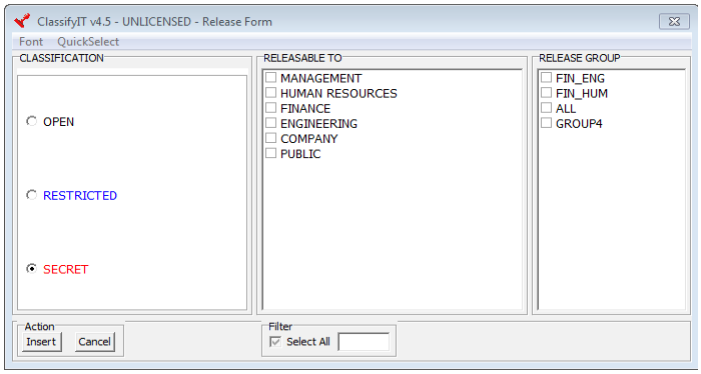
The Word menu appears in the Word application and offers 3 user functions to add security classification information to word documents and a form to manage properties (meta-data) for the word document.



Release Form

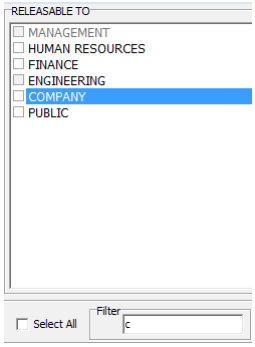
Main Interface

The main user interface of the ClassifyIt tool is the **Release Form**, which is the exact same for Outlook and Word. It is opened, whenever the Stamp of the menu (see above) is selected (clicked). The content is fully customisable and is defined by the administrator. The release form is grouped in 3 sections.



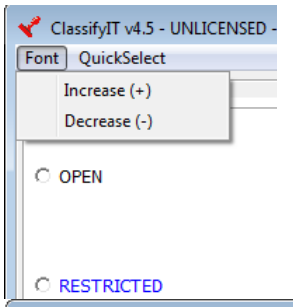
The **first** is the list of Classifications, where the user needs to select one classification, it is not possible to select multiple classifications. For each entry a hint can be configured which will be shown when the mouse is 'hovering' above the entry (e.g. the meaning/definition of SECRET).

The **second** section is a list of release markings, where none, one or multiple can be selected. For each entry a hint can be configured which will be shown when the mouse is 'hovering' above the entry (e.g. the meaning/definition of MANAGEMENT). At the bottom of the section there is a selection box with which all release markings can be selected and de-selected. A **filter** can be used to find entries in the list of release markings. When text is entered in the filter the first entry which starts with that text will be shown in the release list. Pressing <**return**> will highlight the second entry of that release list.



The **third** section is a list of configured groups to activate multiple release markings (e.g. FIN_ENG is a group for FINANCE and ENGINEERING). Selecting a group will add to the currently activated release markings those defined in the group, release markings which were selected before stay selected. After selecting a group, the a confirmation is shown indicating that the appropriate release markings are activated, afterwards the group selection is deactivated. (Note: entries in the group section are unchecked at all times).

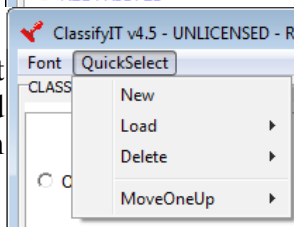
Menu Font



With Release 4.5 ClassifyIt introduced a user menu on top of the Release Form.

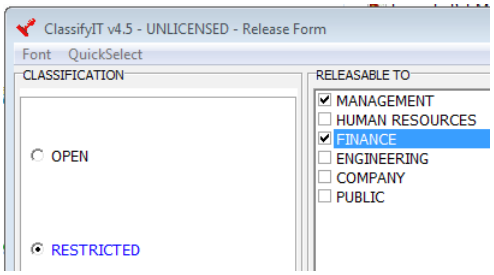
The **Font** menu provides the option for the user to adjust the font size, by increasing or decreasing it by one. Once selected the font size will be used at the next startup time.

Menu Quick-Select



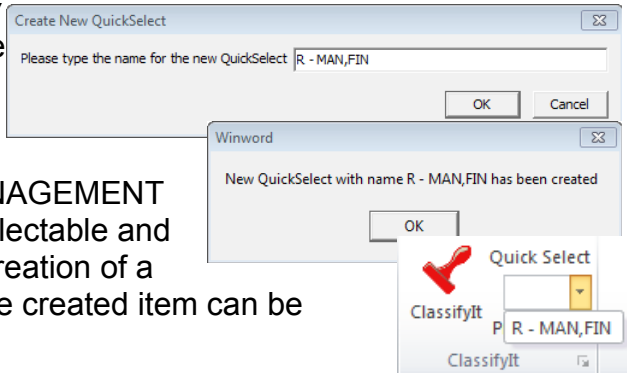
The **Quick-Select** menu provides the option for the user to define Quick-Select items. When starting ClassifyIt for the very first time, there is no Quick-Select item. If there are often used classification and release marking combinations the user can define this combination and use it afterwards with Quick-Select.

An example of defining a Quick-Select Item



To define a new Quick-Select item mark a classification (here RESTRICTED) and optional release markings (here MANAGEMENT and FINANCE).

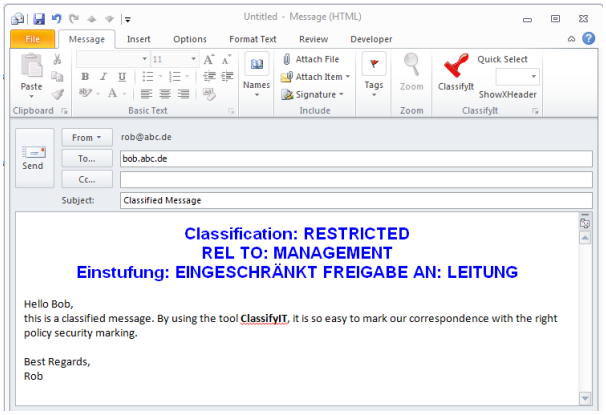
Select Quick-Select → New to create a new Quick-Select item, which can be used later as a predefined Quick-Select item.

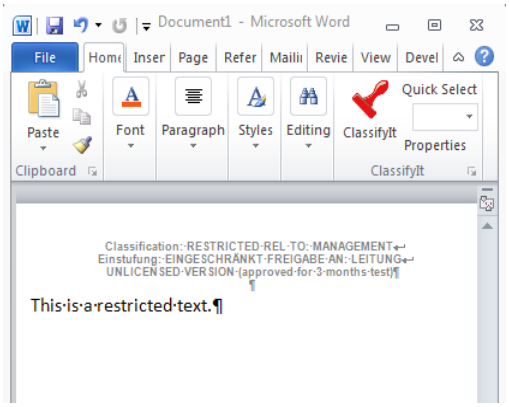


In the following dialogue *'Create New Quick Select'* requests a name for the Quick-Select item. For ease of understanding in the example a short version of the marking is used: R for RESTRICTED and MAN,FIN for MANAGEMENT and FINANCE. The name is freely selectable and if successful ClassifyIt confirms the creation of a new Quick-Select item. Afterwards the created item can be used.

Closing Release Form

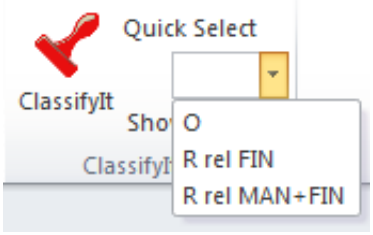
The Release Form is closed either confirming the classification and release marking by pressing the Insert button, or cancelled by pressing the Cancel button. When inserted the appropriate text with its formatting is added to the email or word document.


Untitled - Message (HTML)
Classification: RESTRICTED
REL TO: MANAGEMENT
Einstufung: EINGESCHRÄNKT FREIGABE AN: LEITUNG
Hello Bob,
this is a classified message. By using the tool ClassifyIT, it is so easy to mark our correspondence with the right policy security marking.
Best Regards,
Rob


Document1 - Microsoft Word
Classification: RESTRICTED REL TO: MANAGEMENT
Einstufung: EINGESCHRÄNKT FREIGABE AN: LEITUNG
UNLICENSED VERSION (approved for 3 months test)
This is a restricted text.

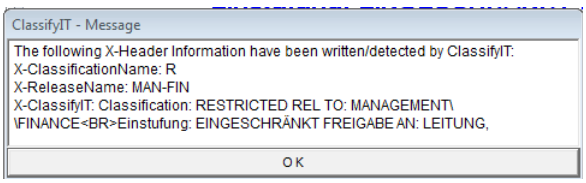
The classifications added by ClassifyIt to the email or word document, show the marking being in English and a 'translated' classification in German. Both markings are at a RESTRICTED level and released to a MANAGEMENT entity (please note that the markings are not added with the same ClassifyIt configuration, therefore the formatting is different).

Quick-Select



Classifications can also be added with the Quick-Select function. It provides pre-selected, often used classification and release combinations. The example shows a 'short-text' which represents the real classification and release, for example O stands for OPEN (without a release). R rel FIN stands for RESTRICTED REL TO FINANCE. R rel MAN+FIN stands for RESTRICTED REL TO MANAGEMENT / FINANCE. The combinations are to be configured by the Administrator. (Note: a future version of ClassifyIt will allow users to select their own Quick-Select options.

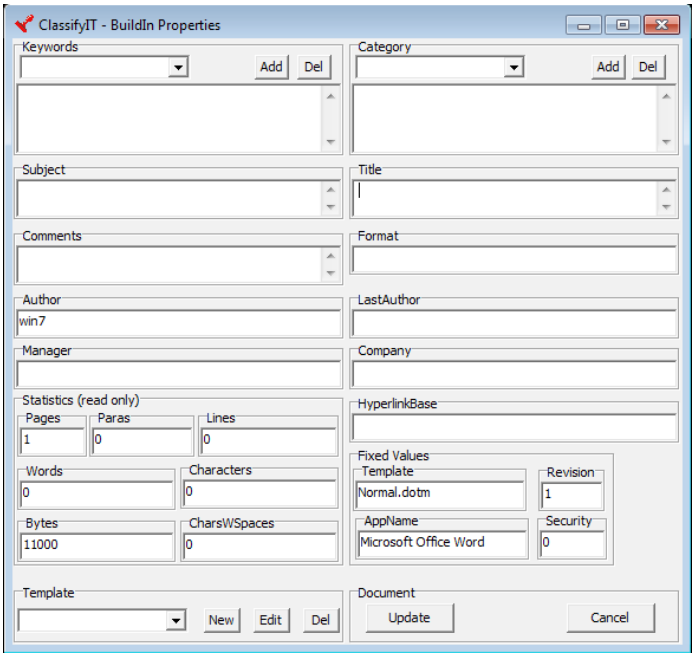
Show-XHeader


ClassifyIT - Message
The following X-Header Information have been written/detected by ClassifyIT:
X-ClassificationName: R
X-ReleaseName: MAN-FIN
X-ClassifyIT: Classification: RESTRICTED REL TO: MANAGEMENT\
\FINANCE
Einstufung: EINGESCHRÄNKT FREIGABE AN: LEITUNG,
OK

The **Show-XHeader** function is only available for emails and shows which X-Header information is added to the email. In principle 3 X-Header information are added to the email, after a classification was added. The first is a marking for the classification, the second a marking for the releasability and a third for the whole marking as added to the email.

Properties

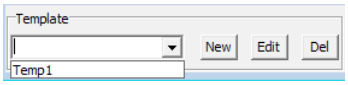
The **Properties** function is only available for word documents and provides a form to view and edit 'custom' or 'BuildIn' standard properties of a word document. The form shows those properties, it also shows *Statistical* information about the document and the *Fixed Values*. The *Statistics* and *Fixed Values* cannot be changed. All other values can be edited and when pressing *Update*, the values are stored in the properties of the document. *Cancel* will not store any changes.

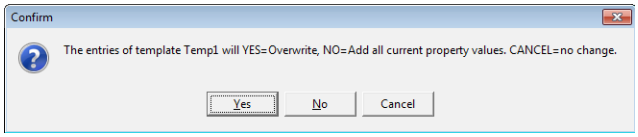


Helping the user on adding property information (meta-data) efficiently to the document ClassifyIt provides 3 additional functions.

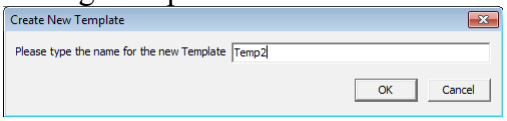
Template

Users can define **Templates** which define entries for each of the editable properties. When a Template is selected (in this example there is only one defined, *Temp1*, the user can select either *YES* to overwrite all properties with those defined in that Template (all current values will be deleted!), or *NO* to add the values of the Template to the property (all current values will remain and those defined in the Template will be added), or *CANCEL* to not change any property value.





The Template menu provides 3 more functions to manage templates. *New* creates a new Template with the values as currently in the property fields displayed. The user is asked to enter a template name under which the template can be selected the next time (*Temp2* in this example). *Edit* changes the values of the currently selected Template. *Del* deletes the currently selected Template.



Keyword & Category

In support of the *Keywords* and *Category* properties, ClassifyIt provides functions to add predefined values to the property. Selected values are added with a comma and space at the end of the current value. The *Add* function allows to predefine an additional term and *Del* removes the currently selected value from the list of predefined terms.